# Forward and Delegate Rules

The Forward and Delegate Rules are similar in that both will send an Item to other users. The Actions applied by these Rules can be seen in the properties of an Item in the sender's Sent Items folder. A message (such as Forwarded or Delegated) is placed in the Subject: line and/or the Body of the Item sent to the recipient. Finally, both are often used in conjunction with the Extended Leave Rule, to make sure that when an Item is received, it will receive attention in a timely manner.

These Actions **differ** in that:

- **Forward** means to **send a copy** of an Item to other users.
- **Delegate** means to **assign an Item** to other users.

Differences in the way that the two Actions work include:

Mail Messages

- Mail Messages can be Forwarded to other users as needed. This will send a copy of the message to the other user, and leave the original in the original recipient's mailbox.
- Mail Messages can be Delegated when using a Rule. This will also send a copy of the Mail Message to the other user. Mail Messages cannot be delegated manually from the Mailbox Folder.

Appointments

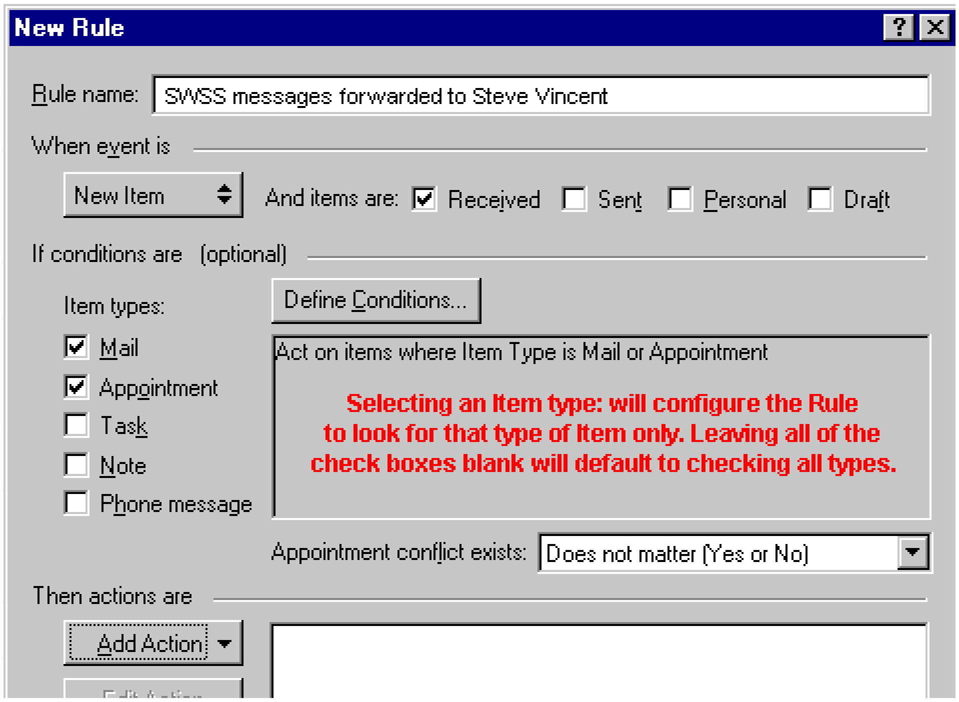
- Forwarded Appointments are for informational purposes only. This means that the person to whom the Appointment is Forwarded can read the information, but **cannot** Accept or Decline it. The Appointment will only appear in that person's Mailbox, not in their Calendar.
- Delegated Appointments can be Accepted or Declined. The action taken will be recorded in the properties of the Item in the original sender's Sent Items folder.

Tasks

- Forwarded and Delegated Tasks can be Accepted or Declined. The action taken will be recorded in the properties of the Item in the original sender's Sent Items folder.

To establish a Forward or Delegate Rule:

Select **Tools | Rules** from the GroupWise Menu Bar and click the **New** button in the Rules dialog box that appears. In the **Rule name:** field, enter an appropriate name (e.g. SWSS messages Forwarded to Steve Vincent).



Rule name: SWSS messages forwarded to Steve Vincent

New Item — And items are: ☑ Received ☐ Sent ☐ Personal ☐ Draft

Item types:
☑ Mail
☑ Appointment
☐ Task
☐ Note
☐ Phone message

Act on items where Item Type is Mail or Appointment

**Selecting an Item type: will configure the Rule to look for that type of Item only. Leaving all of the check boxes blank will default to checking all types.**

Appointment conflict exists: Does not matter (Yes or No)

b) **When event is:/Item Type:**

   a) In the **When event is:** section, leave the **New Item** button set to New Item. (This will set the rule to watch for new Items in the Mailbox).

   b) In **And items are:** check the appropriate box(s). (In this case - **Received**. This will set the rule to watch for New Items as they are received.).

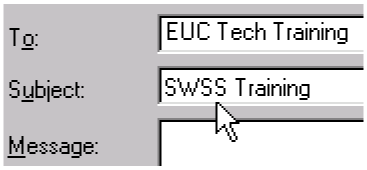
2. In the **If conditions are:** section:

   a) Check the appropriate boxes under **Item types**.

      Note: If none of the boxes are checked, the rule will apply to **all** types.

This example filters the messages by checking the Subject Line for the word **SWSS**. This does not mean that SWSS is the only word in the Subject Line. This defines that the word SWSS must be "**contained**" somewhere in the Subject Line.

Example of the word **SWSS** in the Subject: line.



To: EUC Tech Training

Subject: SWSS Training

Message:

   b) Click the **Define Conditions...** button.

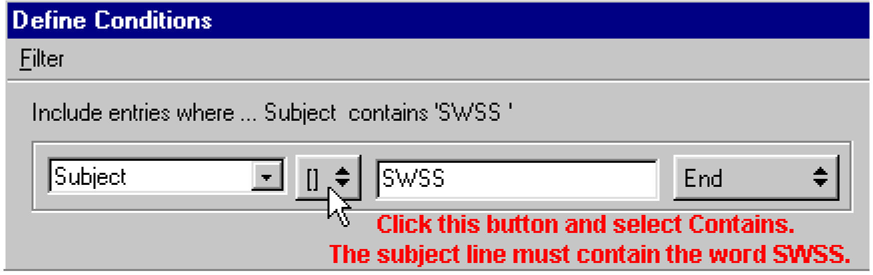
c) Click the pick arrow next to the first box and select **Subject**. (If **Subject** is not available, select **All Fields…** and pick from the list.)

d) Click the button and select **[ ]Contains**.

e) In the next box enter the word or phrase the Rule will use to identify the message.
Note: The word or phrase spelling must exactly match what the Rule is looking for. This entry is not case sensitive.)

f) Leave the **End** button as is, unless there are other words to be entered (as in the Advanced Extended Leave Message.).

The Defined Conditions screen for this Rule should appear similar to this example.



Include entries where ... Subject contains 'SWSS '

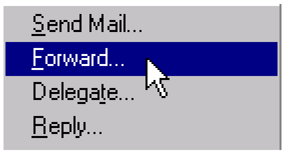
Subject [] SWSS

Click this button and select Contains.
The subject line must contain the word SWSS.

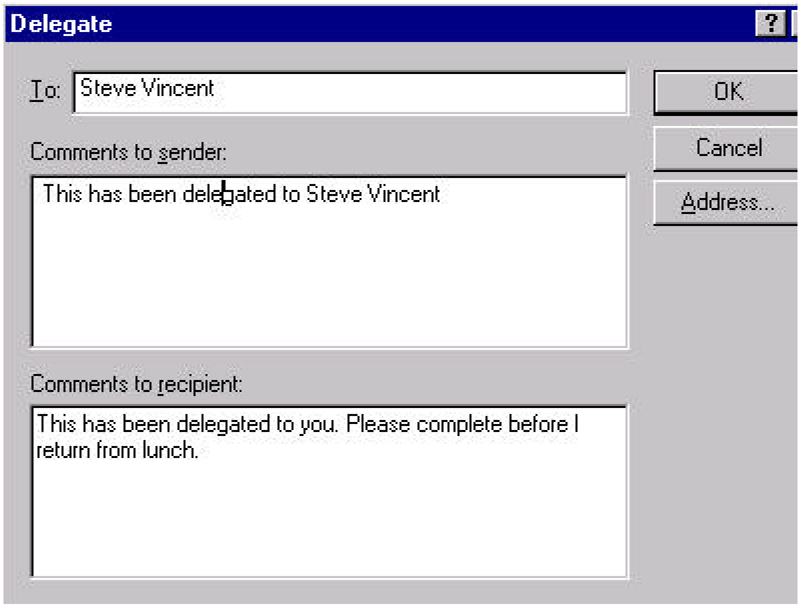
g) Select **OK** to save.

3. In the **Then actions are:** section.
4. Click the **Add Action** button and select the action that you want to apply. (**Forward** or **Delegate**).

- Forward - Forward a **copy** of an Item to a designated user.
- Delegate - Delegate (**assign**) an Item to a designated user.



5. Use the **Address Book** button to fill in the address of user the message is being Forwarded (Delegated) to.
6. Enter the **Subject** and **Information** in the Message area.



To: Steve Vincent

Comments to sender:
This has been delegated to Steve Vincent

Comments to recipient:
This has been delegated to you. Please complete before I return from lunch.

**Note:** If using the Delegate Action, you can send comments to both the Sender and Recipient.

7. Select **OK**.

8. Verify that there is a check mark in the check box next to the new Rule's name and click the **Close** button.

# Miscellaneous Rules

There are many different types of Rules that users can configure to help them manage their GroupWise. Unfortunately, we cannot cover all of them here. Instead, we have provided the following example. along with the previous Extended Leave examples, to get you started.

In this example we will be creating an **Empty Item** Rule that will automatically move unwanted items (usually Mail Messages) from the Mailbox Folder to the Trash Folder and then empty (delete) them for the Trash Folder. This Rule is particularly useful for eliminating unwanted or unsolicited messages, so that the user never has to open and read the item.

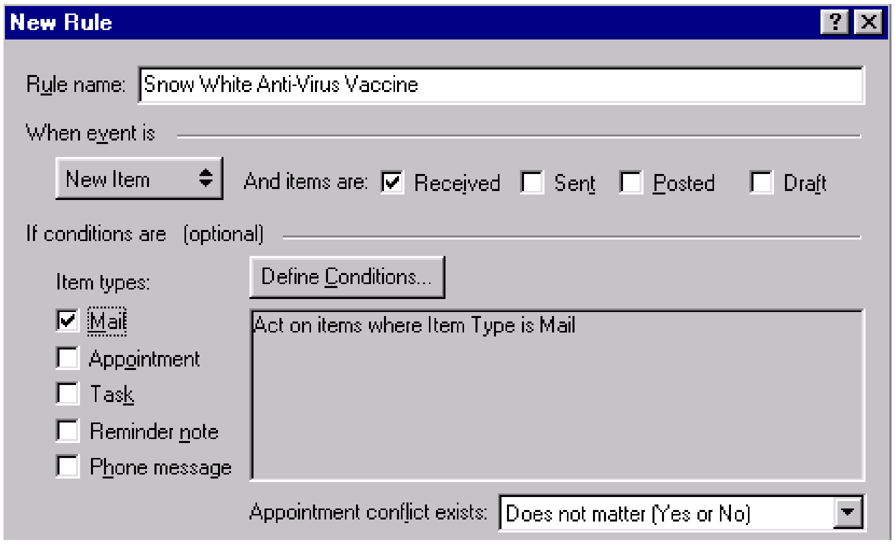
> Note: If configured incorrectly, this Rule can remove legitimate business related messages. To avoid this problem, it is important that you read and follow the procedures listed below.

**Problem Examples** - Two examples of how an Empty Item rule can create a problem are Chain Letters and Jokes. Chain Letters and jokes are sent with many different titles in the Subject line. This makes it impossible to configure a Rule against them. One thing that usually appears in this type of message is the word **Fwd:** in the Subject line. Configuring a Rule to look for the word **Fwd:** in a Subject line or for a particular user's name (one who constantly sends these messages), creates another problem. Items that may be legitimately business related will be emptied right along with any nuisance messages.

**Good Example** - A good example of messages to be removed by an Empty Item Rule is the messages containing viruses, particularly the type of virus that can e-mail itself to all the people in your Address Book.

The key to configuring an Empty Item Rule is to have it look for a common word or phrase that appears in the Subject line of each of the nuisance messages. To demonstrate this, we will be using the "Snow White" virus (also known as "sexyfun"). This virus is always received with one of these two words somewhere in the Subject line.

Select **Tools | Rules | New** and click the **New** button in the Rules dialog box to open the New Rule dialog screen.


New Rule
?
Define Conditions...

Rule name: Snow White Anti-Virus Vaccine

When event is

New Item And items are: ☑ Received ☐ Sent ☐ Posted ☐ Draft

If conditions are (optional)

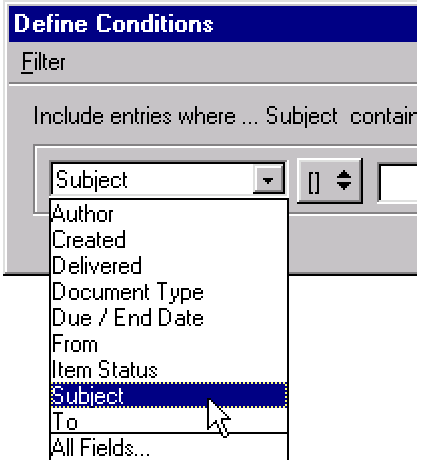
Item types:

☑ Mail
☐ Appointment
☐ Task
☐ Reminder note
☐ Phone message

Act on items where Item Type is Mail

Appointment conflict exists: Does not matter (Yes or No)

1. In the **Rule name**: box enter an appropriate name.
2. Under the **When event is:** section, check the appropriate box. (In this case **Received**).
3. Check the appropriate boxes under **Item types**. (**Mail**)
4. Click the **Define Conditions** button:
    a) Click the pick arrow next to the left box and select the appropriate category in which the word(s) will be found. (In this case **Subject**).

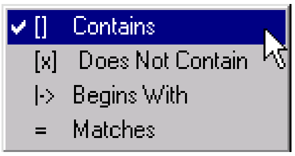

Define Conditions
Filter
Author
Created
Delivered
Document Type
Due / End Date
From
Item Status
Subject
To
All Fields...

Include entries where ... Subject contair

Subject []

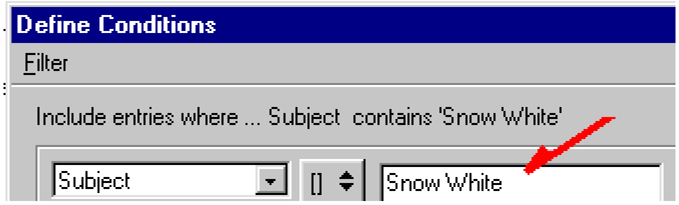
**Note:** Selecting **All Fields...** provides many more selections to choose from.

b) Click the button and select the appropriate condition (**[ ] Contains**).


✓ [] Contains
[x] Does Not Contain
|-> Begins With
= Matches

- [] Contains - Subject contains the term "Snow White"
- [x] Does Not Contain - Does not contain the word or term
- |-> Begins With - Begins with
- = Matches – Contains only the term

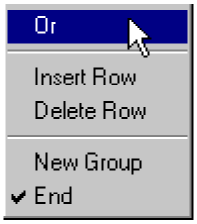
c) In the center entry box, enter the **word(s)** that identify the message.
**Note:** This entry is not case sensitive, but **must** be spelled correctly including spaces.



Include entries where ... Subject contains 'Snow White'

Subject | [] | Snow White

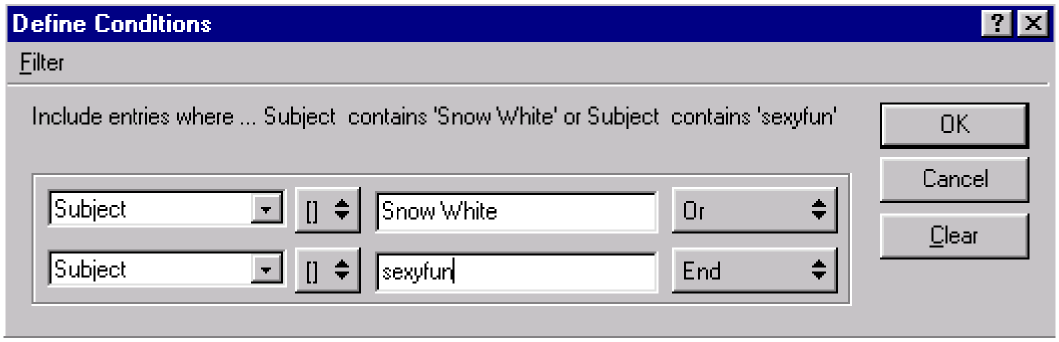
d) Click the **End** button and select one of the following:



- And - The subject line must meet all of the defined conditions.
- Or - The subject line must meet at least one of the defined conditions
- End - This is the end of the defined conditions.

**Note:** For this example select **Or**. This is because the Subject line will contain one phrase **or** the other, but not both.

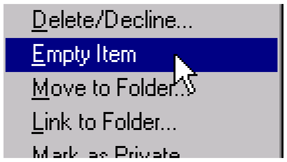
5. In the next line that appears, repeat step # 5 a-c, entering the selection listed below:
   - **Subject**
   - **[ ] Contains**
   - **sexyfun**
   - **End**



Include entries where ... Subject contains 'Snow White' or Subject contains 'sexyfun'

Subject | [] | Snow White | Or
Subject | [] | sexyfun | End

**Note:** Because this example refers to Mail only (see Item types:), the **Appointment conflict exists:** box does not require any changes.



6. Click the **Add Action** button and select **Empty Item**.
7. Click **Save**.
8. Verify that the box next to the Rule's name is checked and select **Close**.

Test the Rule by having another user send you a message with the word(s) that you entered in the Defined Conditions in the Subject: line. (In this case two messages, one containing **Snow White** and the other **sexyfun**.) You should never see either message in your Mailbox Folder or Trash Folder. If you do see the message, check the spelling of the Word(s) or Phrases(s) in the message and the Defined Conditions section of the Rule.